


STATE OF HAWAII  
**DEPARTMENT OF HUMAN SERVICES**

P.O. Box 339  
Honolulu, Hawaii 96809

February 18, 2004

MEMORANDUM

TO: All Interested Applicants

FROM: Lillian B. Koller, Esq., Director 

SUBJECT: **REQUEST FOR PROPOSALS (RFP) – VOCATIONAL REHABILITATION SERVICES;  
RFP No. HMS-903-04-06-O**

The Department is seeking to purchase the service listed above and further described in the attached RFP.

The RFP provides information to assist applicants in the preparation of program plans and budget, including:

1. A description of the service sought;
2. Special requirements to be met by the provider;
3. The criteria by which qualifying proposals shall be reviewed/rated; and
4. The criteria for monitoring and evaluating the contract.

The RFP should be reviewed very closely as all parts of the RFP must be addressed. Informational meeting is scheduled for Oahu on Monday, March 15, 2004, 9:00 to 11:00 AM at the DHS, BESSD Office at 820 Mililani Street, Suite 606, Honolulu, Hawaii, 96813. For more information, please call 586-7050.

The Department's FSE&T Program staff will be present at the informational session to review the RFP requirements and address any questions you may have. In order for the proposals to be considered, all applicants are required to submit:

1. One (1) original and three (3) copies of the proposal, delivered or mailed to the Department of Human Services, Benefit, Employment and Support Service Division, Haseko Center, 820 Mililani Street, Suite 606, Honolulu, Hawaii 96813.
2. Proposals no later than 4:30 p.m., Wednesday, April 6, 2004.

Proposal and materials not requested by the department or submitted after the deadline will not be accepted for consideration.

Attachments

# **PROPOSAL MAIL-IN AND DELIVERY INFORMATION SHEET**

**ONE ORIGINAL AND THREE (3) COPIES OF THE PROPOSAL ARE REQUIRED.**

**ALL MAIL-INS MUST BE POSTMARKED BY USPS BEFORE 12:00 MIDNIGHT,**

## **All Mail-ins**

Department of Human Services  
Benefit, Employment and Support Services Division  
Employment/Child Care Program Office  
Haseko Center  
820 Mililani Street, Suite 606  
Honolulu, Hawaii 96813

## **DHS RFP REPRESENTATIVE**

Scott Nakasone  
For further info. or inquiries

Phone: 586-7072  
Fax: 586-5744

**ALL HAND DELIVERIES WILL BE ACCEPTED AT THE FOLLOWING SITES UNTIL 4:30 P.M.,  
April 6, 2004.**

## **Drop-off Sites**

Department of Human Services  
Benefit, Employment and Support Services Division  
Employment/Child Care Program Office  
Haseko Center  
820 Mililani Street, Suite 606  
Honolulu, Hawaii 96813  
Attn: Scott Nakasone, Program Specialist

## **BE ADVISED:**

**All mail-ins postmarked USPS after 12:00 midnight, April 6, 2004, will not be accepted for review and will be returned.**

**Hand deliveries will not be accepted after 4:30 p.m., April 6, 2004.**

**Deliveries by private mail services such as Fedex shall be considered hand deliveries and will not be accepted if received after 4:30 p.m., April 6, 2004.**

**Procurement Timetable**  
**Vocational Rehabilitation Services (Oahu)**  
(Effective 02/18/04)

Activity	Scheduled Date
Public Notice announcing Request for Proposals (RFP)	02/29/04
Distribution of RFP	03/01/04
RFP orientation session on Oahu (9:00 am-11:00 am)	03/15/04
Closing date for submission of written questions for written responses	03/19/04
State purchasing agency's response to applicants' written questions	03/23/04
Proposal submittal deadline	04/06/04
Proposal evaluation period ends	04/12/04
Provider selection and award	04/13/04
Notice of statement of findings and decisions	04/13/04
Date of contract execution	06/01/04
Contract start date	07/01/04

**State of Hawai‘i**

**Department of Human Services**

**Benefit, Employment and Support Services Division**

**VOCATIONAL REHABILITATION SERVICES**  
**OAHU**

**RFP Number: HMS-903-04-06-O**

**March 1, 2004**

**COMPETITIVE POS  
RFP HMS 903-04-06-O**

**TABLE OF CONTENTS**

**SECTION 1 - ADMINISTRATIVE OVERVIEW**

I.	Authority .....	1-1
II.	RFP Organization.....	1-1
III.	Contracting Office.....	1-2
IV.	Procurement Timetable .....	1-2
V.	Orientation .....	1-2
VI.	Submission of Questions.....	1-3
VII.	Submission of Proposals .....	1-3
VIII.	Discussions w/Applicants Prior to, or After Proposal Submittal Deadline .....	1-4
IX.	Additional Materials and Documentation .....	1-4
X.	RFP Amendments .....	1-4
XI.	Final Revised Proposals .....	1-5
XII.	Cancellation of Request for Proposal.....	1-5
XIII.	Costs for Proposal Preparation.....	1-5
XIV.	Provider Participation in Planning .....	1-5
XV.	Rejection of Proposals .....	1-5
XVI.	Opening of Proposals .....	1-6
XVII.	Notice of Award.....	1-6
XVIII.	Protests .....	1-6
XIX.	Availability of Funds.....	1-7
XX.	Criteria by which the Performance of the Contract will be Monitored and Evaluated.....	1-7
XXI.	General and Special Conditions of Contract.....	1-8
XXII.	Cost Principles .....	1-8

**SECTION 2 - SERVICE SPECIFICATIONS**

I.	Introduction	
A.	Background .....	2-1
B.	Purpose or need.....	2-1
C.	Description of the goals of the service .....	2-1
D.	Description of the target population to be served .....	2-1
E.	Geographic coverage of service .....	2-2
F.	Probable funding amounts, source, and period of availability .....	2-2

II.	General Requirements	
A.	Specific qualifications or requirements, including but not limited to licensure or accreditation .....	2-2
B.	Secondary purchaser participation .....	2-2
C.	Multiple or alternate proposals .....	2-2
D.	Single or multiple contracts to be awarded .....	2-2
E.	Single or multi-term contracts to be awarded .....	2-3
F.	RFP contact person .....	2-3
III.	Scope of Work	
A.	Service Activities(Minimum and/or mandatory tasks and responsibilities) .....	2-3
B.	Management Requirements.....	2-8

### **SECTION 3 - POS PROPOSAL APPLICATION INSTRUCTIONS**

	General Instructions .....	3-1
I.	Background and Summary .....	3-2
II.	Experience and Capability	
A.	Necessary Skills and Experience .....	3-2
B.	Quality Assurance and Evaluation .....	3-2
C.	Coordination of Services.....	3-2
D.	Facilities .....	3-2
III.	Personnel: Project Organization and Staffing	
A.	Proposed Staffing.....	3-2
B.	Staff Qualifications .....	3-3
C.	Supervision and Training .....	3-3
D.	Organization Chart.....	3-3
IV.	Service Delivery.....	3-3
V.	Financial	
A.	Pricing Structure .....	3-3
B.	Other Financial Related Materials (Optional).....	3-5
VI.	Other	
A.	Litigation.....	3-5

## **SECTION 4 - PROPOSAL EVALUATION**

I.	Introduction .....	4-1
II.	Evaluation Process	
A.	Evaluation Categories and Threshold .....	4-1
III.	Evaluation Criteria	
A.	Phase 1 - Evaluation of Proposal Requirements .....	4-2
B.	Phase 2 - Evaluation of POS Proposal Application. ....	4-2
C.	Phase 3 - Recommendation for Award .....	4-4

## **SECTION 5 - ATTACHMENTS**

A	Competitive POS Application Checklist
B	POS Proposal Application - Sample Table of Contents
C	SPO-H-205A-Instructions for Organization-Wide Budget by Source of Funds
D	SPO-H-205B-Instructions for Organization-Wide Budget By Programs

# Section 1

## Administrative Overview



## Section 1

### Administrative Overview

Applicants are encouraged to read each section of the RFP thoroughly. While sections such as the administrative overview may appear similar among RFPs, state purchasing agencies may add additional information as applicable. It is the responsibility of the applicant to understand the requirements of *each* RFP.

#### I. Authority

This RFP is issued under the provisions of the Hawaii Revised Statutes, Chapter 103F and its administrative rules. All prospective applicants are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective applicant shall constitute admission of such knowledge on the part of such prospective applicant.

#### II. RFP Organization

This RFP is organized into five sections:

***Section 1, Administrative Overview***--Provides applicants with an overview of the procurement process.

***Section 2, Service Specifications***--Provides applicants with a general description of the tasks to be performed, delineates applicant responsibilities, and defines deliverables (as applicable).

***Section 3, POS Proposal Application***--Describes the required format and content for the proposal application.

***Section 4, Proposal Evaluation***--Describes how proposals will be evaluated by the state purchasing agency.

***Section 5, Attachments*** --Provides applicants with information and forms necessary to complete the application.

### III. Contracting Office

The Contracting Office is responsible for overseeing the contract(s) resulting from this RFP, including system operations, fiscal agent operations, and monitoring and assessing provider performance. The Contracting Office is:

Department of Human Services, State of Hawai'i  
Benefit, Employment & Support Services Division  
Haseko Center, 820 Mililani Street, Suite 606  
Phone: (808) 586-7050 Fax: (808) 586-5744

### IV. Procurement Timetable

Activity	Scheduled Date
Public Notice announcing Request for Proposals (RFP)	02/29/04
Distribution of RFP	03/01/04
RFP orientation session on Oahu (9:00 am-11:00 am)	03/15/04
Closing date for submission of written questions for written responses	03/19/04
State purchasing agency's response to applicants' written questions	03/23/04
Proposal submittal deadline	04/06/04
Proposal evaluation period ends	04/12/04
Provider selection and award	04/13/04
Notice of statement of findings and decisions	04/13/04
Date of contract execution	06/01/04
Contract start date	07/01/04

### V. Orientation

An orientation for applicants in reference to the request for proposals will be held on Monday, March 15, 2004, 9:00 to 11:00 AM at the DHS, BESSD Office at 820 Mililani Street, Suite 606, Honolulu, Hawaii, 96813. For more information, please call 586-7050. Applicants are encouraged to submit written questions prior to the orientation. Impromptu questions will be permitted and spontaneous answers provided at the orientation at the state purchasing agency's discretion. Verbal answers provided at the orientation are only intended as general direction and may not represent the state purchasing agency's position. Formal official responses will be provided in writing. To ensure a written response, any oral questions should be submitted in writing following the close of the orientation, but no later than 4:30 p.m. H.S.T., on 03/19/04 in order to generate a written state purchasing agency response.

## VI. Submission of Questions

Applicants may submit questions to the RFP Contact Person identified in Section 2 of this RFP. The deadline for submission of written questions is 4:30 p.m. H.S.T., on 03/19/04. All written questions will receive a written response from the state purchasing agency by 03/23/04.

## VII. Submission of Proposals

Proposals must contain all components. Please refer to the Competitive POS Application Checklist (Section 5, Attachment A) for information on: 1) where to obtain the forms/instructions; 2) additional program specific requirements; and 3) the order in which all components of the application should be assembled and submitted to the state purchasing agency. Proposals must contain the following components:

- (1) ***POS Proposal Application (Form SPO-H-200A), including Title Page (Form SPO-H-200) and Table of Contents*** - Applicant shall submit comprehensive narratives that addresses all of the issues contained in the POS Proposal Application, including a cost proposal/budget. (Refer to Section 3 of this RFP.)
- (2) ***Competitive POS Application Check List*** – Provides applicants with information on where to obtain the required forms; information on program specific requirements; and the order in which all components should be assembled and submitted to the state purchasing agency.
- (3) ***Registration Form (SPO-H-100A)*** – If applicant is not pre-registered with the State Procurement Office (business status), this form must be submitted with the application. If applicant is unsure as to their pre-registration status, they may check the State Procurement Office website at:  
<http://www.state.hi.us/icsd/dags/spo.html>  
 Click on *Health and Human Services*  
 Click on *The Registered List of Private Providers for Use with the Competitive Method of Procurement*  
 or call the purchasing agency at 586-7050 or the State Procurement Office at 587-4706.
- (4) ***Tax Clearance Certificate*** (Form A-6) - An original **or** certified copy of a tax clearance certificate issued by the Hawaii State Department of Taxation (DOTAX) **and** the Internal Revenue Service (IRS) shall be submitted with the proposal by the due date and time. The two-part Tax Clearance Application (Form A-6) that combines DOTAX and IRS tax clearance shall be used for this purpose.

- (5) **Certifications** - Federal and/or State certifications, as applicable, to include: a tax clearance certificate from the Department of Taxation and the Internal Revenue Service, current within six months of issuance date, and a certificate of good standing from the Business Registration Division of the Department of Commerce and Consumer Affairs, current within six months of issuance date.
- (6) **Program Specific Requirements** - Additional program specific requirements are included in Sections 2 and/or 3, Service Specifications and the POS Proposal Application, as applicable.

Multiple or alternate proposals shall **not** be accepted unless specifically provided for in Section 2 of this RFP. In the event alternate proposals are **not** accepted and an applicant submits alternate proposals but clearly indicates a primary proposal, it shall be considered for award as though it were the only proposal submitted by the applicant.

One original and 3 copies of the proposal are required. Proposals must be postmarked or hand delivered by Tuesday, April 6, 2004, 4:30 P.M. to the Department of Human Services, Benefit, Employment and Support Services Division, Haseko Center, 820 Mililani Street, Suite 606, Honolulu, HI 96813. Any proposal post-marked or received after the designated date and time shall be rejected. Proposals should be sent in hard copy form only.

### **VIII. Discussions with Applicants Prior to, or After Proposal Submittal Deadline**

Discussions may be conducted with applicants who submit proposals determined to be reasonably susceptible of being selected for award, but proposals may be accepted without discussions, in accordance with the administrative rules.

### **IX. Additional Materials and Documentation**

Upon request from the state purchasing agency, each applicant shall submit any additional materials and documentation reasonably required by the state purchasing agency in its evaluation of the proposals.

### **X. RFP Amendments**

The State reserves the right to amend this RFP at any time prior to the closing date for the final revised proposals.

## **XI. Final Revised Proposals**

The applicant's final revised proposal, *as applicable* to this RFP, must be postmarked or hand delivered by the date and time specified by the state purchasing agency. Any final revised proposal post-marked or received after the designated date and time will be rejected. If a final revised proposal is not submitted, the previous submittal will be construed as their best and final offer/proposal. *Only the section(s) of the proposal that are amended shall be submitted by the applicant, along with the POS Proposal Application Title Page (SPO-H-200).* After final revised proposals are received, final evaluations will be conducted for an award.

## **XII. Cancellation of Request for Proposal**

The request for proposal may be canceled and any or all proposals may be rejected in whole or in part, when it is determined to be in the best interests of the State.

## **XIII. Costs for Proposal Preparation**

Any costs incurred by applicants in preparing or submitting a proposal are the applicants' sole responsibility.

## **XIV. Provider Participation in Planning**

Provider participation in a state purchasing agency's efforts to plan for or to purchase health and human services prior to the state purchasing agency's release of a request for proposals, including the sharing of information on community needs, best practices, and providers' resources, shall not disqualify providers from submitting proposals if conducted in accordance with sections 3-142-203 and 3-143-618 of the Hawaii Administrative Rules for Chapter 103F, HRS.

## **XV. Rejection of Proposals**

The State reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the problems involved and comply with the service specifications. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be rejected without further notice.

A proposal may be automatically rejected for any one or more of the following reasons: (Relevant sections of the Hawaii Administrative Rules for Chapter 103F, HRS are parenthesized)

- (1) Rejection for failure to cooperate or deal in good faith.  
(Section 3-141-201)
- (2) Rejection for inadequate accounting system. (Section 3-141-202)
- (3) Late proposals (Section 3-143-603)
- (4) Inadequate response to request for proposals (Section 3-143-609)
- (5) Proposal not responsive (Section 3-143-610 (1))
- (6) Applicant not responsible (Section 3-143-610 (2))

## **XVI. Opening of Proposals**

Upon receipt of proposal by a state purchasing agency at a designated location, proposals, modifications to proposals, and withdrawals of proposals shall be date-stamped and, when possible, time-stamped. All documents so received shall be held in a secure place by the state purchasing agency and not examined for evaluation purposes until the submittal deadline.

Procurement files shall be open to public inspection after a contract has been awarded and executed by all parties.

## **XVII. Notice of Award**

A Notice of Award containing a statement of findings and decision shall be provided to all applicants by mail upon completion of the evaluation of competitive purchase of service proposals.

## **XVIII. Protests**

Any applicant may file a protest (using a prescribed form provided by the administrator of the State Procurement Office available on the State Procurement Office Website whose address is on the Competitive POS Application Checklist located in the Attachments section of this RFP) against the awarding of the contract as long as an original and two copies of the protest is served upon the head of the state purchasing agency that conducted the protested procurement, and the procurement officer who handled the protested procurement, by United States mail, or by hand-delivery. A Notice of Protest regarding an award of contract and related matters that arise in connection with a procurement made under a competitive purchase of services shall be served within five working days of the postmark of the notice of findings and decision sent to the protester. The Notice of Protest form, SPO-H-801, is available on the SPO website (see the POS Proposal Checklist in Section 5 of this RFP). Only the following matters may be protested:

- (1) a state purchasing agency's failure to follow procedures established by Chapter 103F of the Hawaii Revised Statutes;
- (2) a state purchasing agency's failure to follow any rule established by Chapter 103F of the Hawaii Revised Statutes; and
- (3) a state purchasing agency's failure to follow any procedure, requirement, or evaluation criterion in a request for proposals issued by the state purchasing agency.

<b>Head of State Purchasing Agency</b>	<b>Chief Procurement Officer</b>
Lillian B. Koller	Edwin Igarashi
Director	Procurement Office
P.O: Box 339	P.O. Box 339
Honolulu, HI 96813	Honolulu, HI 96813

### **XIX. Availability of Funds**

The award of a contract and any allowed renewal or extension thereof, is subject to allotments to be made by the Director of Finance, State of Hawaii, pursuant to Chapter 37, Hawaii Revised Statutes, and subject to the availability of State and/or Federal funds.

### **XX. Criteria by Which the Performance of the Contract will be Monitored and Evaluated**

The criteria by which the performance of the contract will be monitored and evaluated are:

- (1) Performance/Outcome Measures
- (2) Output Measures
- (3) Quality of Care/Quality of Services
- (4) Financial Management
- (5) Administrative Requirements

## **XXI. General and Special Conditions of Contract**

The general conditions that will be imposed contractually are on the SPO website (see the POS Proposal Application Checklist in Section 5 of this RFP for the address). Special conditions may also be imposed contractually by the state purchasing agency, as deemed necessary.

## **XXII. Cost Principles**

In order to promote uniform purchasing practices among state purchasing agencies procuring health and human services under Chapter 103F, HRS, state purchasing agencies will utilize standard cost principles outlined in Form SPO-H-201 which is available on the SPO Website (see the POS Proposal Application Checklist in Section 5 of this RFP). Nothing in this section shall be construed to create an exemption from any cost principle arising under federal law.



# Section 2

## Service Specifications

## **Section 2**

### **Service Specifications**

#### **I. Introduction**

##### **A. Background**

The State of Hawaii, Department of Human Services, hereafter called the Department, is requesting proposals from qualified applicants to provide vocational rehabilitation services for Temporary Assistance to Needy Families (TANF) and Temporary Assistance to Other Needy Families (TAONF) program recipients on Oahu only, who are currently exempt from work requirements due to physical and/or mental disability.

##### **B. Purpose or Need**

The purpose of vocational rehabilitation services is to provide vocational rehabilitation, training and employment services, including assessment, counseling, independent living skills training, job readiness, job coaching, job placement, job retention, ongoing case management and support services (e.g. child care, transportation, work-related expenses) to assist physically and mentally disabled TANF and TAONF recipients, find and retain employment.

##### **C. Description of the goals of the service**

The goal of this project is to provide vocational rehabilitation services to a minimum of 300 referred TANF and TAONF recipients, who are currently exempt from mandatory work requirements due to physical and/or mental disability, to enable them to overcome the barriers, and allow them to effectively participate in the work program. This will be further described in section III, Scope of Work.

##### **D. Description of the target population to be served**

The population to be served are the adult TANF and TAONF recipients of the Benefit, Employment and Support Services Division (BESSD), who are currently exempt from mandatory work requirements due to physical and/or mental disability. **Please note that these adult TANF and TAONF clients are not diagnosed with “severe” or “most severe” disabilities, mental and/or physical.**

**E. Geographic coverage of service**

The provider/contractor will be required to serve the TANF and TAONF eligible physically and/or mentally disabled recipients throughout the island of Oahu, census tracts 1-114.99. The Department of Human Services reserves the right to change census tract designations after affording the contractor 30 days notice.

**F. Probable funding amounts, source, and period of availability**

This contract is expected to be Federally funded. The maximum amount of funding for this contract for FY 2005 (July 1, 2004 through June 30, 2005) is \$475,000.00 and \$475,000.00 for one (1) twelve-month extension subject to the availability of funds and provider performance.

An additional \$50,000 per year is available for support service payments to subsidize the purchase of assistive technology for eligible clients, which is not available through community resources or medical insurance.

**II. General Requirements****A. Specific qualifications or requirements, including but not limited to licensure or accreditation**

The applicant shall comply with the Chapter 103F, HRS Cost Principles for Purchases of Health and Human Services identified in SPO-H-201 (Effective 10/1/98), which can be found on the SPO website (See Section 5, POS Proposal Checklist, for the website address).

**B. Secondary purchaser participation**  
(Refer to §3-143-608, HAR)

There are no planned secondary purchasers.

**C. Multiple or alternate proposals**  
(Refer to §3-143-605, HAR)

☐ Allowed                      ☒ Unallowed

**D. Single or multiple contracts to be awarded**  
(Refer to §3-143-206, HAR)

☒ Single                      ☐ Multiple                      ☐ Single & Multiple

**E. Single or multi-term contracts to be awarded**  
(Refer to §3-149-302, HAR)

☒ Single term ( $\leq$  2 yrs)                      ☐ Multi-term ( $>$  2 yrs.)

Contract terms:

A single term contract (twelve months), with the option of one (1) twelve month extension subject to availability of funds and contractor performance, shall be awarded.

**F. RFP contact person**

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the winning provider or providers. Written questions should be submitted to the RFP contact person and received on or before the day and time specified in Section I, Item IV (Procurement Timetable) of this RFP.

Scott Nakasone, (808) 586-7072

### **III. Scope of Work**

The Department intends to procure vocational rehabilitation services for TANF and TAONF recipients who have a physical and/or mental disability which would adversely affect their ability to become self-sufficient and employable.

The contractor is being requested to provide the following types of services to the clients:

**A. Service Activities (Minimum and/or mandatory tasks and responsibilities)**

- 1) Provider's staff shall act as the Department of Human Services designee relating to the provision of vocational rehabilitation services.
- 2) Provider's staff shall comply with all appropriate federal and state laws, rules and regulations, and policies and procedures governing the State run programs involved, including but not limited to TANF, TAONF, First-to-Work, Child Care Connection, and Child Support Enforcement. Provider shall use appropriate departmental forms and other written material.

- 3) Provider shall use the Hawaii Automated Network Assistance (HANA) system to do case management, data entry, and issue support services payments including: child care, transportation, work-related expenses, and assistive technology. The resources for these payments shall be retained within the departmental budget.
- 4) Provider shall oversee the services provided to the Department's vocational rehabilitation clients as described below. The Provider is responsible for the supervision of its staff. The Provider shall be the point of contact for the other providers or Department staff who may also be assisting the client in achieving self-sufficiency as part of the client's service plan.
- 5) Provider shall make referrals to community partners, and other providers of services as most appropriate to address client's treatment related needs.
- 6) Provider shall prepare monthly reports and invoices as required by the Department.

#### **B. Scope of Services**

**Please note that applicants may propose and alternate service delivery model. The following Scope of Services encompasses the minimum requirements to be performed by the Provider:**

##### **1) Intake and Assessment**

Disabled clients shall be referred to the Department of the Vocational Rehabilitation Services Provider (Provider) for intake and assessment services via random selection from a pool through the HANA system. The pool shall draw from those clients whose medical and/or psychiatric disability has been diagnosed by a licensed physician or psychologist. A copy of this report will be made available upon request. The disabled population will comprise of clients who need job placement and retention services.

The intake and assessment session between the client and Provider will help the Provider to identify the strengths and weaknesses of the client and assess the client's basic skills and aptitudes. The information obtained from the intake and assessment will be used to formulate the Individualized Placement Plan, which outlines the services to be provided to the client.

## 2) **Individualized Placement Plan Development**

Discussion and planning shall take place with the client, Provider, family members, or others supporting the client's vocational goals. The client's goals, needs, and abilities are all taken into consideration when formulating the Individualized Placement Plan.

The Individualized Placement Plan, developed by the Provider within (ten) 10 days following the completion of intake and assessment session, shall specify the precise services the client desires to access. The resulting plan will provide the basis for the provision of services. This plan will be reviewed and revised regularly so services are flexible and focused.

## 3) **Employment Preparation Services**

Interested bidders should carefully describe all proposed services requested below. The proposed program shall offer individualized employment preparation services for clients with different needs. Services shall be designed to enable the client to acquire the knowledge, skills habits, and attitudes essential to getting and keeping a good job. Services shall include meetings with an assigned counselor and group sessions on a variety of topics. The employment preparation services will depend on the needs of the client.

### a. **Job Readiness Sessions**

Job readiness sessions shall focus on different components depending on the limitations of the clients. For example, services for some clients may focus on areas such as grooming, dressing, interpersonal skills, money management, and independent living skills, etc. Whereas, job readiness sessions for the work ready employee would focus on job search skills and attitudes required for employment. The purpose of this job readiness training is not only to develop the client's knowledge, skills, habits and attitude to be job ready, but also to assist clients in understanding work rules and an ability to adhere to work rules. Job readiness sessions are an integral part of the successful placement of an individual in a work environment.

### b. **Coaching, supervision and training**

Pre-employment services might include coaching the client in areas such as self-esteem, attitudes at work, communication, behavior management, etc. Supervision might be on-going for some clients

as social interaction and role-playing in a work situation are explored. Training shall be provided on various independent living skills, such as money management, transportation, etc. which would support successful employment.

c. **Group and Individual meetings**

Group job readiness training would be designed for the work ready employee. These meetings would cover topics such as career awareness and exploration, dependability, self presentation, job search, resumes, motivation, positive attitude, work ethics and interviewing skills.

Clients would also work with the Provider individually to develop their job readiness. Specific needs are identified in the Individualized Placement Plan. Examples of training areas include but are not limited to: self-esteem and self-image, interpersonal skills, conflict resolution, interviewing skills, etc. The counselor would also assist the client in preparing resumes, with completing applications, and by conducting mock job interviews.

**4) Job Development**

The Provider shall assist the client in job search and locating a job opening that suits the client's needs, interests, and abilities. Assistance includes, but is not limited to, contacting employers by letter and/or on the telephone, canvassing and visiting employers.

The Provider provides continued assistance to the client, including guidance regarding resume preparation, job-finding strategies, approaching friends and family, completing employment applications, practicing interviewing skills and coordination in approaching employers.

**5) Job Placement and Retention**

The job placement goal for the client shall be appropriate employment of thirty-two hours (32) a week. In the early stages, client may have to engage in unpaid volunteer activity and/or paid employment to maximize participation. Clients will be eligible for release when they work an average of thirty-two hours a week for a sixty-day period. Recognizing the disabilities of the clients, a minimum 60-day job retention follow-up will begin to help participants successfully maintain and retain their job. Job analysis and job accommodation negotiations may be needed. Additional services may include helping the clients develop natural support systems that may consist of the employer, co-workers, family, or others involved

with the client. Job coaching is available to ensure the client learns job duties and appropriate behavior for the specific setting. Scheduled visits to the job site to monitor work progress should be a part of the post-employment phase. When problems arise, the Provider should provide necessary interventions to resolve the problems.

After the 60-day job retention follow-up period is over and the Provider determines the client is no longer in need of further rehabilitative services, the client shall be referred back to the Department.

**Cases in the job retention follow-up phase shall require less activity and monitoring on the part of the Provider and shall not be considered part of the caseload requirement. A limited number of clients may require job retention services beyond the 60-day period as determined by the Provider.**

**6) On-going Case Management**

Case management shall be on-going from assessment through post-employment progress.

**7) Support Services and Participation Reimbursement**

The Provider shall use the HANA system to issue support services payments to eligible clients. The support services shall include, but not limited to, child care, transportation, training and work-related expenses, and assistive technology. The supportive services payments are not part of the appropriation for vocational rehabilitation services contract. The Department has allocated \$50,000.00 per year for the purchase of assistive technology for eligible clients. Any purchase of assistive technology exceeding \$500.00 shall require division administrative review and prior approval.

**8) Provider Performance Bonus**

Successful placement of a client in unsubsidized employment of 32 hours a week and the client retains the employment at 32 hours a week for the period as described in Section III(B)(5) shall be eligible for a one-time payment of \$1,000 per client placement.

Successful placement of a client in unsubsidized employment of 20 hours a week and the client retains the employment at 20 hours a week for the period as described in Section III(B)(5) shall be eligible for a one-time payment of \$500 per client placement.



The total payments for this Provider Performance Bonus shall not exceed \$25,000.00 per state fiscal year (July 1 through June 30).

**The Provider Performance Bonus is subject to availability of funds. The Department reserves the right to make any changes to the Provider Performance Bonus at any time with 30 day prior written notice.**

**B. Management Requirements (Minimum and/or mandatory requirements)**

**1) Personnel**

The Provider shall determine the number of staff required to provide the contracted services and shall address the qualifications of their personnel to conduct this service. The Department shall refer a minimum of 300 disabled clients from the pool and shall continue to refer clients until the Provider has reached the optimum caseload requirement for each counselor. Provider shall hire the staff on an incremental basis as the caseload increases to 50 clients per counselor. The caseload standard for each counselor will be 50 clients per month once the case has an Individualized Placement Plan in place.

The Provider may opt to use their existing staff to dispense their obligations under the contract. However, they must prorate the work time of the staff in accordance with the total time spent on the work/activities required under this contract.

The Provider must prorate the time of the staff if their caseload falls below the maximum staff is required to carry. For example, a staff member is hired full-time to carry a caseload of 50 cases but is carrying only 20 cases, the Provider must prorate their work time and wages in accord with the decrease in the caseload. In this scenario, the Provider would pay for half-time work and wages.

**Also note that applicants may propose an alternative plan of hiring staff to suit their proposed model of service delivery.**

**2) Administrative**

**a. Hours of Operation:** Normal hours of operation shall be 7:45 a.m. to 4:30 p.m., excluding State Holidays.

**b. Division Procedures:** The contractor shall follow Procedures established by the Division regarding (1) support services for child care, transportation, and work related expenses, (2) transitional

health care and transitional child care, (3) case closures, and (4) monitoring and tracking of participation. (5) reporting of all data related to clients and client participation.

**3) Quality assurance and evaluation specifications**

The contract shall be evaluated based upon performance as described in section III listed above. The contract will also be reviewed for overall cost effectiveness based upon the overall cost compared to the performance outcome.

**4) Output and performance/outcome measurements**

The performance of the Provider shall be measured by the specifications described as follows:

- a. To provide all referrals an orientation to services and job readiness workshop;
- b. To develop an Individualized Placement Plan (IPP) within 10 days of completion of Intake and Assessment sessions;
- c. To progress 40% of all eligible clients into job placement, replacement, and/or retention services by the ninth month of enrollment in program services;
- d. To assist 20% of eligible clients with identified barriers to employment with barrier removal, and placement into gainful employment in a job of their choice within 12 months of enrollment in program services; and
- e. To provide satisfactory services at a rate of 80% or higher to all clients.

**5) Reporting requirements for program and fiscal data**

The offeror shall submit monthly expenditure reports for the operation of the program that serve as invoices for reimbursement. The form "Subgrantees Invoice and Expenditure Report" shall be the official forms used for the Subgrantee to request funds for the contract.

Use Hawaii Automated Network Assistance terminal (HANA) available at a designated location to enter client data and payment information. Monthly reports shall be prepared and submitted to the Employment Program Specialist, ECCPO, BESSD. While manual reports may be

submitted, the computer entries shall be the official report. The contractor will not receive credit for client performance if the data are not entered into the computer system designated for use.

Monthly program reports are generated to document the program participant's progress. In addition, data can be extrapolated on an annual basis providing a comprehensive management report that includes the following:

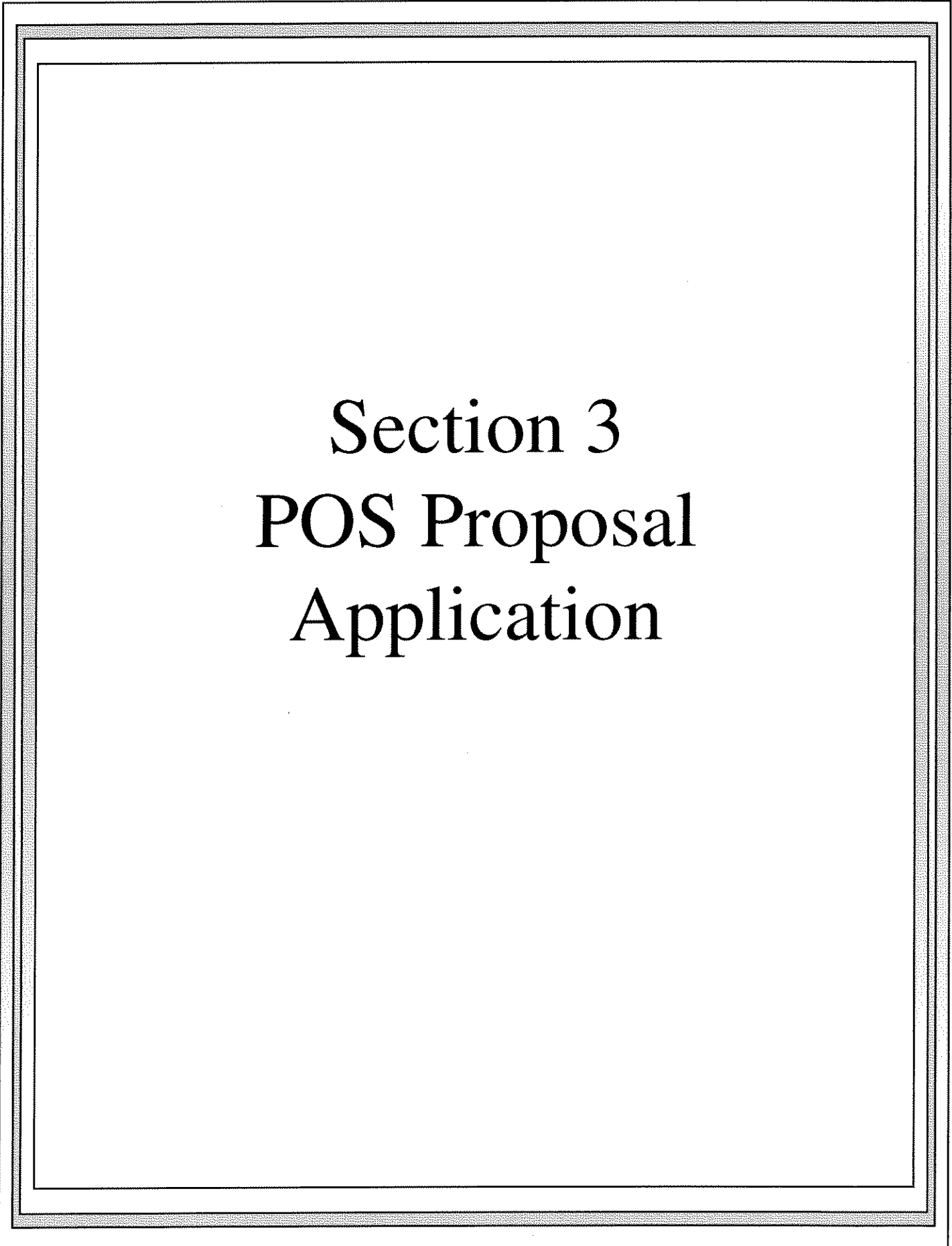
- Number of clients served;
- Number of clients reporting for assessments;
- Number of clients completing assessments;
- Number of clients assessed with no vocational rehabilitation issues;
- Number of clients needing Individualized Placement Plans (IPP);
- Number of clients completing IPP within 9 months of enrollment;
- Number of clients completing IPP after 9 months of enrollment;
- Number of clients receiving support services;
- Number of clients receiving assistive technology services;
- Number of clients with work activity of 20 hours a week;
- Number of clients with work activity of 32 hours a week;
- Number of vocational rehabilitation cases closed;
- Number of vocational rehabilitation cases closed due to employment;
- Number of cases closed after completing assessments;
- Number of cases closed after completing IPP;
- Number of cases closed for failure to participate;
- Number of clients meeting Provider Performance Bonus of 20+ hours;
- Number of clients meeting Provider Performance Bonus of 32+ hours.

#### **6) Pricing structure or pricing methodology to be used**

The applicant shall comply with the Chapter 103F, HRS Cost Principles for Purchase of Health and Human Services identified in SPO-H-201 (Effective 10/1/98), which can be found in the POS Manual. Cost principles represent guidelines in determining which types of expenditures will be reimbursed, payment dollar limits, payment policy constraints, and the requirements for verification and documentation. The budget amount for the operation of the project must not exceed the amount stated in the RFP. Allowable costs to operate the program are reimbursable on a monthly basis after services are rendered. The offeror shall abide by all the Federal regulations as legislated by Public Law 101-508, Omnibus Budget Reconciliation Act of 1990. Any expenditure made or authorized by the offeror which is subsequently determined by the Federal government to be unallowable shall be repaid to the State or offset against any other funds to which the offeror may be entitled.

**7) Units of service and unit rate**

Not applicable.



# Section 3

## POS Proposal Application

## Section 3

### POS Proposal Application Instructions

#### General instructions for completing applications:

- *POS Proposal Applications shall be submitted to the state purchasing agency using the prescribed format outlined in this section.*
- *The numerical outline for the application, the titles/subtitles, and the applicant organization and RFP identification information on the top right hand corner of each page should be retained. The instructions for each section however may be omitted.*
- *Page numbering of the POS Proposal Application should be consecutive, beginning with page one and continuing through the complete proposal.*
- *Proposals may be submitted in a three ring binder (Optional).*
- *Tabbing of sections (Recommended).*
- *Applicants must also include a Table of Contents with the POS Proposal Application. A sample format is reflected in Section 5, Attachment B of this RFP.*
- *A written response is required for **each** item unless indicated otherwise. Failure to answer any of the items will impact upon an applicant's score.*
- *Applicants are encouraged to take Section 4, Proposal Evaluation, into consideration when completing the proposal.*
- *This form (SPO-H-200A) is available on the SPO Website (for the website address see the Competitive POS Application Checklist in Section 5, Attachments). However, the form will not include items specific to each RFP. If using the website form, the applicant must include all items listed in this section.*

#### The POS Proposal Application comprises the following sections:

- *Title Page*
- *Table of Contents*
- *Background and Summary*
- *Experience and Capability*
- *Personnel: Project Organization and Staffing*
- *Service Delivery*
- *Financial*
- *Other*

## **I. Background and Summary**

This section shall clearly and concisely summarize and highlight the contents of the proposal in such a way as to provide the State with a broad understanding of the entire proposal. Include a brief description of the applicants' organization, the goals and objectives related to the service activity, and how the proposed service is designed to meet the problem/need identified in the service specifications.

## **II. Experience and Capability**

### **A. Necessary Skills and Experience**

The applicant shall demonstrate that it has the necessary skills, abilities, knowledge of, and experience relating to the delivery of the proposed services. The applicant shall also provide a listing of verifiable experience with projects or contracts for the most recent five years that are pertinent to the proposed services.

### **B. Quality Assurance and Evaluation**

The applicant shall describe its quality assurance and evaluation plans for the proposed services, including methodology.

### **C. Coordination of Services**

The applicant shall demonstrate the capability to coordinate services with other agencies and resources in the community.

### **D. Facilities**

The applicant shall provide a description of its facilities and demonstrate its adequacy in relation to the proposed services. If facilities are not presently available, describe plans to secure facilities. Also describe how the facilities meet ADA requirements, as applicable, and special equipment that may be required for the services.

## **III. Personnel: Project Organization and Staffing**

### **A. Proposed Staffing**

The applicant shall describe the proposed staffing pattern, client/staff ratio and proposed caseload capacity appropriate for the viability of the services. (Refer to the personnel requirements in the Service Specifications, as applicable.)

**B. Staff Qualifications**

The applicant shall provide the minimum qualifications (including experience) for staff assigned to the program. (Refer to the qualifications in the Service Specifications, as applicable)

**C. Supervision and Training**

The applicant shall describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.

**D. Organization Chart**

The applicant shall reflect the position of each staff and line of responsibility/supervision. (Include position title, name and full time equivalency) Both the “Organization-wide” and “Program” organization charts shall be attached to the POS Proposal Application.

**IV. Service Delivery**

The Service Delivery Section shall include a detailed discussion of the applicant’s approach to applicable service activities and management requirements from Section 2, Item III. - Scope of Work, including (if indicated) a work plan of all service activities and tasks to be completed, related work assignments/responsibilities and timelines/schedules.

**V. Financial****A. Pricing Structure**

Applicant’s shall submit a cost proposal utilizing the pricing structure designated by the state purchasing agency. The cost proposal shall be attached to the POS Proposal Application.

**1) Pricing Structure Based on Cost Reimbursement**

The cost reimbursement pricing structure reflects a purchase arrangement in which the State pays the contractor for budgeted costs that are actually incurred in delivering the services specified in the contract, up to a stated maximum obligation.

The purchasing agency shall consider cost proposals based on “cost type” or “pure reimbursement” pricing structure from the applicants’ who are non-profit organizations licensed to do business in State of Hawaii. “Cost-



type” involves payment of all incurred costs within a predetermined total estimated cost.

The purchasing agency shall consider cost proposals based on “cost-plus-fixed-fee” from the applicants who are for-profit organizations licensed to do business in State of Hawaii. “Cost-plus-fixed-fee” allows for payment of all incurred costs within a predetermined amount plus an agreed upon fee which will not change. **We anticipate these fees to be limited to 10% or less of the contract award. Also, these fees need to be built within the contract ceiling.** *Please note*, however, that the Department reserves the right to negotiate the final amount of fixed fee within the limits discussed above.

The purchasing agency shall select the applicable cost proposals subject to the legal standing of the applicant organization, e.g., non-profit or for-profit and that are in the best interest of the state.

The following budget form(s), where applicable or as requested by the state purchasing agency, which are contained in the POS manual shall be submitted with the POS Proposal Application:

SPO-H-205  
 SPO-H-205A  
 SPO-H-205B  
 SPO-H-206A  
 SPO-H-206B  
 SPO-H-206C  
 SPO-H-206D  
 SPO-H-206E  
 SPO-H-206F  
 SPO-H-206G  
 SPO-H-206H  
 SPO-H-206I  
 SPO-H-206J

All budget forms, instructions and samples are located on the SPO website (see the POS Proposal Checklist in Section 5 for website address). The following budget form(s) shall be submitted with the POS Proposal Application:

**B. Other Financial Related Materials**

**1) Accounting System**

In order to determine the adequacy of the applicant's accounting system as described under the administrative rules, the following documents are requested as part of the POS Proposal Application (may be attached):

Audit Report (most recent).  
Tax Clearance

**VI. Other**

**A. Litigation**

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgement. If applicable, please explain.

# Section 4

## Proposal Evaluation

## Section 4 Proposal Evaluation

### I. Introduction

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly and impartially. Structural, quantitative scoring techniques will be utilized to maximize the objectivity of the evaluation.

### II. Evaluation Process

The procurement officer or an evaluation committee of designated reviewers selected by the head of the state purchasing agency or procurement officer shall review and evaluate proposals. When an evaluation committee is utilized, the committee will be comprised of individuals with experience in, knowledge of, and program responsibility for program service and financing.

The evaluation will be conducted in three phases as follows:

- Phase 1 - Evaluation of Proposal Requirements
- Phase 2 - Evaluation of POS Proposal Application
- Phase 3 - Recommendation for Award

#### A. Evaluation Categories and Threshold

##### Evaluation Categories

##### Possible Points

##### **Mandatory Requirements**

##### **Pass or Rejected**

##### ***POS Proposal Application***

##### **100 Points**

Background and Summary	10 points
Experience and Capability	20 points
Personnel: Project Organization and Staffing	10 points
Service Delivery	50 points
Financial	10 Points

##### **TOTAL POSSIBLE POINTS**

##### **100 Points**

### **III. Evaluation Criteria**

#### **A. Phase 1 - Evaluation of Proposal Requirements**

##### ***(1) Administrative Requirements***

- Application Checklist
- Registration (if not pre-registered with the State Procurement Office)
- Audit Report (latest)
- Tax Clearance Certificate

##### ***(2) POS Proposal Application Requirements***

- POS Application Title Page (Form SPO-H-200)
- Table of Contents
- Background and Summary
- Experience and Capability
- Personnel: Project Organization and Staffing
- Service Delivery
- Financial (All required forms and documents)
- Program Specific Requirements (as applicable)

#### **B. Phase 2 - Evaluation of POS Proposal Application (100 Points)**

##### ***(1) Background and Summary (10 Points)***

- The applicant has demonstrated a thorough understanding of the purpose and scope of the service activity.
- The goals and objectives are in alignment with the proposed service activity.
- The applicant has described how the proposed service is designed to meet the pertinent issues and problems related to the service activity.

##### ***(2) Experience and Capability (20 Points)***

The State will evaluate the applicant's experience and capability relevant to the proposal contract, which shall include:

- Demonstrated skills, abilities, knowledge of, and experience relating to the delivery of the proposed services.

- Sufficiency of quality assurance and evaluation plans for the proposed services, including methodology.
- Demonstrated capability to coordinate services with other agencies and resources in the community.
- Adequacy of facilities relative to the proposed services.

**(3) *Personnel: Program Organization and Staffing (10 Points)***

The State will evaluate the applicant's overall staffing approach to the service that shall include:

- That the proposed staffing pattern, client/staff ratio, and proposed caseload capacity is reasonable to insure viability of the services.
- Minimum qualifications (including experience) for staff assigned to the program.
- Demonstrated ability to supervise, train and provide administrative direction to staff relative to the delivery of the proposed services.
- Organization Chart (Approach and rationale for the structure, functions, and staffing of the proposed organization for the overall service activity and tasks).

**(4) *Service Delivery (50 Points)***

Evaluation criteria for this section will assess the applicant's approach to the service activities and management requirements outlined in the POS Proposal Application.

- Describes the overall program content and design.
- Demonstrates an understanding of the various service activities and sequence of events.
- Presents evidence of cooperation and collaboration, and willingness to follow DHS requirements, policies and procedures.
- Demonstrates an understanding of the target group.
- Demonstrates knowledge of case documentation and case record maintenance.

- Demonstrates knowledge of handling customer service and complaints.
- Provides for public relations and community collaboration.
- Describes staff/program management activities.

**(5) Financial (10 Points)**

Pricing structure based on cost reimbursement:

- Personnel costs are reasonable and comparable to positions in the community.
- Non-personnel costs are reasonable and adequately justified.
- To what extent does the budget support the scope of service and requirements of the Request for Proposal?
- Adequacy of accounting system.
- Tax Clearance Certificate (Form A-6)

**IV. Phase 3 - Recommendation for Award**

Each notice of award shall contain a statement of findings and decision for the award or non-award of the contract to each applicant.

# Section 5

## Attachments



## **Section 5**

### **Attachments**

#### **Attachment**

#### **Document**

- |   |   |
|---|---|
| A | Competitive POS Application Checklist                                     |
| B | POS Proposal Application - Sample Table of Contents                       |
| C | SPO-H-205A - Instructions for Organization-Wide Budget by Source of Funds |
| D | SPO-H-205B - Instructions for Organization-Wide Budget by Programs        |

# Competitive POS Application Checklist

Applicant: \_\_\_\_\_

RFP No.: HMS 903-04-06-O \_\_\_\_\_

The applicant's proposal must contain the following components in the order shown below. This checklist must be signed, dated and returned to the state purchasing agency as part of the POS Proposal Application. \*SPO-H Forms are located on the web at <http://www.spo.hawaii.gov> Click on *Procurement of Health and Human Services* and then on *Procurement Forms & Instruction for Private Agencies*.\*

Item	Reference in RFP	Format/Instructions Provided	Required by Purchasing Agency	Completed by Applicant
<b>General:</b>				
1. POS Proposal Application Title Page (SPO-H-200)	Section 1, RFP	SPO Website*	X	
2. Competitive POS Application Checklist	Section 1, RFP	Attachment A	X	
3. Table of Contents	Section 5, RFP	Section 5, RFP	X	
4. POS Proposal Application (SPO-H-200A)	Section 3, RFP	SPO Website*	X	
5. Registration Form (SPO-H-100A)	Section 1, RFP	SPO Website*	(Required if not Pre-Registered)	
6. Tax Clearance Certificate (Form A-6)	Section 1, RFP	SPO Website*	X	
7. Cost Proposal (Budget)				
SPO-H-205	Section 3, RFP	SPO Website*	X	
SPO-H-205A	Section 3, RFP	Section 5, RFP	X	
SPO-H-205B	Section 3, RFP	Section 5, RFP	X	
SPO-H-206A	Section 3, RFP	SPO Website*	X	
SPO-H-206B	Section 3, RFP	SPO Website*	X	
SPO-H-206C	Section 3, RFP	SPO Website*	X	
SPO-H-206D	Section 3, RFP	SPO Website*		
SPO-H-206E	Section 3, RFP	SPO Website*	X	
SPO-H-206F	Section 3, RFP	SPO Website*	X	
SPO-H-206G	Section 3, RFP	SPO Website*	X	
SPO-H-206H	Section 3, RFP	SPO Website*	X	
SPO-H-206I	Section 3, RFP	SPO Website*	X	
SPO-H-206J	Section 3, RFP	SPO Website*		
<b>Certifications:</b>				
8. Federal Certifications	Section 1, RFP	Section 5, RFP		
Debarment & Suspension		Section 5, RFP		
Drug Free Workplace Requirements		Section 5, RFP		
Lobbying		Section 5, RFP		
Program Fraud Civil Remedies Act		Section 5, RFP		
Environmental Tobacco Smoke		Section 5, RFP		
<b>Program Specific Requirements:</b>				
9. Organization Chart	Section 3, RFP		X	
10. Financial Statement/Policy	Section 3, RFP		X	

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## POS Proposal Application Table of Contents

<b>I.</b>	<b>Background and Summary .....</b>	<b>1</b>
<b>II.</b>	<b>Experience and Capability</b>	
A.	Necessary Skills and Experience .....	2
B.	Quality Assurance and Evaluation .....	3
C.	Coordination of Services.....	4
D.	Facilities .....	5
<b>III.</b>	<b>Personnel: Project Organization and Staffing</b>	
A.	Proposed Staffing .....	6
B.	Staff Qualifications .....	7
C.	Supervision and Training .....	8
D.	Organization Chart (Program & Organization-wide - attached)	
<b>IV.</b>	<b>Service Delivery .....</b>	<b>9</b>
<b>V.</b>	<b>Attachments</b>	
<b>A.</b>	<b>Cost Proposal</b>	
1.	SPO-H-205 Proposal Budget	
2.	SPO-H-206A Budget Justification - Personnel: Salaries & Wages	
3.	SPO-H-206B Budget Justification - Personnel: Payroll Taxes and Assessments, and Fringe Benefits	
4.	SPO-H-206C Budget Justification - Travel: Interisland	
5.	SPO-H-206E Budget Justification - Contractual Services - Administrative	
<b>B.</b>	<b>Other Financial Related Materials</b>	
1.	Financial Audit for fiscal year ended June 30, 1991.	
<b>C.</b>	<b>Performance and Output Measurement Tables</b>	
1.		
<b>D.</b>	<b>Program Specific Requirements</b>	
1.		

**Instructions for Completing  
FORM SPO-H-205A ORGANIZATION - WIDE BUDGET BY  
SOURCE OF FUNDS**

<b>Applicant/Provider:</b>	Enter the Applicant's legal name.
<b>RFP#:</b>	Enter the Request For Proposal (RFP) identifying number of this service activity.
<b>For all columns (a) thru (d)</b>	<p>Report your total organization-wide budget for this fiscal year by <b>source of funds</b>. Your organization's budget should reflect the total budget of the "organization" legally named. Report each source of fund in separate columns, by budget line item.</p> <p>For the first column on the first page of this form, use the column heading, "Organization Total".</p> <p>For the remaining columns you may use column headings such as: Federal, State, Funds Raised, Program Income, etc. If additional columns are needed, use additional copies of this form.</p>
<b>Columns (b), (c) &amp; (d)</b>	Identify sources of funding in space provided for column titles.
<b>TOTAL (A+B+C+D)</b>	Sum the subtotals for Budget Categories A, B, C and D, for columns (a) through (d).
<b>SOURCE OF FUNDING:</b> (a) (b) (c) (d)	Identify all sources of funding to be used by your organization.
<b>TOTAL REVENUE</b>	Enter the sum of all revenue sources cited above.
<b>Budget Prepared by:</b>	<p>Type or print the name of the person who prepared the budget request and their telephone number. If there are any questions or comments, this person will be contacted for further information and clarification.</p> <p>Provide signature of Applicant's authorized representative, and date of approval.</p>

Special Instructions by the State Purchasing Agency:

***Not applicable.***

**Instructions for Completing  
FORM SPO-H-205B ORGANIZATION - WIDE BUDGET BY PROGRAMS**

<b>Applicant/Provider:</b>	Enter the Applicant's legal name.
<b>Columns (a) thru (d)</b>  <b>Contract/RFP #</b>	Report your total organization-wide budget by <b>programs</b> . Enter the name of the program, and the contract number or RFP number if applicable, at the top of the column. Enter anticipated expenditures for each program by line item. Include expenditures from all sources of funding to be used by your organization for this program (including the contract amount). If additional columns are needed, use additional copies of this form.  For the first column on the first page of this form, use the column heading, "Organization Total".
<b>SOURCE OF FUNDING:</b> <b>(a) Budget request</b> <b>(b)</b> <b>(c)</b> <b>(d)</b>	Identify all sources of funding to be used by your organization.
<b>TOTAL REVENUE</b>	Enter the sum of all revenue sources cited above.
<b>Budget Prepared by:</b>	Type or print the name of the person who prepared the budget request and their telephone number. If there are any questions or comments, this person will be contacted for further information and clarification. Provide signature of Applicant's authorized representative, and date of approval.

Special Instructions by State Purchasing Agency:

***Not applicable.***